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ABSTRACT

This report provides a national overview of programs and practices relating to vocational education opportunities for older persons as reflected in current literature, a review of state plans, and a survey of state programmatic efforts. In addition to providing a basis for further project development efforts, the report is intended as a resource document for vocational education planners and administrators as well as representatives of older persons' groups. It is divided into five major sections. The first reviews the federal/state policy on vocational education for older persons. By exploring the nature of various social/political factors currently affecting the delivery of vocational education services to older persons, this section provides the context in which current vocational education practices affecting older persons can be evaluated. Section 2 describes vocational education opportunities for older adults. Section 3 provides an overview of the documented methodologies and practices currently utilized in the development of educational programs for older persons. The utilization of older persons as an educational resource is discussed in section 4, and the current state of the art is summarized in section 5. The methodology used to locate and review relevant information is separately described in the appendix. (YLB)

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INTERIM REPORT

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Education And Training For Older Persons

A State Of The Art Summary Report

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The research reported herein was performed pursuant to a contract with the Office of Education, U.S. Department of Health, Education and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

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ABSTRACT

This state-of-the-art report on vocational education for older persons is the first product of a research endeavor funded by the U.S. Office of Education to identify issues that relate to the role of vocational education in serving older persons. The report provides a national overview of programs and practices relating to vocational education opportunities for older persons as reflected in current literature, a review of State Plans and a survey of State programmatic efforts. In addition to providing a basis for further project development efforts, the report is intended as a resource document for vocational education planners and administrators as well as representatives of older persons' groups. Major sections comprising the report address the following topics: 1) Federal/State Policy on Vocational Education for Older Persons; 2) Vocational Education Opportunities for Older Adults; 3) Program Development: An Overview of Current Methodologies and Practices; and 4) Older Persons as Educational Resources.

TABLE OF CONTENTS

	Page
ACKNOWLEDGMENTS	iv
INTRODUCTION	1
Overview	1
Organizational Structure	2
FEDERAL/STATE POLICY ON VOCATIONAL EDUCATION FOR OLDER PERSONS	3
Vocational Opportunities for Older Adults: The Federal Mandate	3
The Vocational Education Act, as Amended	4
State Policy on Vocational Education for Older Persons	4
VOCATIONAL EDUCATION OPPORTUNITIES FOR OLDER ADULTS	6
Federal Support	6
Educational Opportunities	6
Employment and Training Services	9
PROGRAM DEVELOPMENT: AN OVERVIEW OF CURRENT METHODOLOGIES AND PRACTICES	10
Planning	10
Goals/Objectives Determination	12
Needs Assessment	12
Assessment of Educational and Community Resources	14
Counseling and Referral	15
OLDER PERSONS AS EDUCATIONAL RESOURCES	18
SUMMARY	19
REFERENCES	20
APPENDIX	
PROJECT METHODOLOGY	25

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- copies of documents (e.g., journal articles, unpublished manuscripts, bibliographies, brochures, publications lists, etc.);
- copies of library searches;
- sets of counseling modules and training packages; and
- lists of course offerings.

Also appreciated were the many expressions of good wishes, encouragement and interest in the results of the project.

INTRODUCTION

OVERVIEW

Interest in serving the needs of older Americans has burgeoned during the past two decades. This growing interest stems from the interaction of two major social forces: intensified social consciousness exemplified by the civil rights and feminist movements and a fundamental shift in the age structure of the U.S. population. Due to a long-term decline in the fertility rate and substantial increases in life expectancy, the age structure of the U.S. population is shifting more rapidly than was anticipated even a few years ago. It is estimated that by 1990, a cohort of 39 million Americans aged 60 or older will exist, equal in size to the numbers of Americans in their twenties or thirties (U.S. Department of Labor and the U.S. Department of Health, Education and Welfare, 1978).

The implications of this change are fairly profound. The aging of America may well beacon a new era in social and political action which involves a shift of focus from the problems and needs of America's youth to the problems and needs of America's elders. Of central concern is the ability of a constricted youth-based labor force to support an expanded older population. If the nation cannot or will not expand its capacity to support more persons in retirement, the American economy may be forced to retain and absorb an unprecedented number of older workers. The Federal Government's commitment to fostering employment and training opportunities for older adults is exemplified in the recent passage of a number of pieces of legislation which contain sections directly addressed to the employment needs of the older population. In essence, the way is being legislatively paved for older Americans to remain in or re-enter the labor force on a full or part-time, voluntary or paid basis.

Part of the Federal mandate is directed toward vocational education. The Age Discrimination Study conducted by the U.S. Commission on Civil Rights in 1977 found discrimination on the basis of age in the delivery of Federally supported services and benefits to exist to some extent in each of the Federal programs studied. Two of the recommendations resulting from that study centered on vocational education opportunities for older adults. These were:

1. That the U.S. Office of Education (USOE), based on State and local needs assessment data, develop appropriate technical assistance to assist State vocational education agencies to work effectively with its grantees to develop vocational education programs and activities to attract and to meet the needs of older persons;
2. That failure of the State vocational education agencies to respond to this initiative be regarded as a violation of the Age Discrimination Act and appropriate steps be taken to apply sanctions recommended in the report (U.S. Commission on Civil Rights, 1977).

In response to these recommendations, the U.S. Office of Education (USOE) has awarded a contract to CONSERVA to implement a project geared to the identification of issues that relate to the role of vocational education in serving older persons. This *State of the Art Summary Report,* which is the first product of this project, presents a national overview of current policies and practices affecting the delivery of vocational education services to older persons. The underlying purpose for the preparation and dissemination of this summary is to establish a knowledge base upon which future program development can build.

In the literature relating to vocational education for older persons, the term "older persons" has been used in reference to a number of age groups (e.g., persons aged 35 and over, persons aged 50 and over, persons aged 65 and over, etc.) as well as a number of special populations (e.g., displaced homemakers, early retirees, older workers whose jobs have become obsolete due to organizational or technological change, persons who desire to make a mid-life career change, senior citizens, etc.). These and other categories of older persons each have special educational needs. These needs range from courses and programs aimed at self-enrichment and the development of life-coping skills to programs involving career counseling, vocational preparation and job placement.

While it is recognized that the educational needs of the various categories of older persons vary to some degree, it is beyond the scope of this brief summary to explicate the relationship between each category of older persons and the types of educational services needed and currently available to them. Rather, the *primary* focus of this paper will be on providing a national overview of current programs and practices relating to vocational education services for those persons who desire paid or unpaid employment but whose opportunities are restricted because of age. This group includes those who are at or near retirement and wish to continue employment in another career, those who have retired and desire to return to the labor force and those who are entering or reentering the labor force late in life.

ORGANIZATIONAL STRUCTURE

This report is divided into five major sections. The first section reviews the Federal/State policy on vocational education for older persons. By exploring the nature of various social/political factors currently affecting the delivery of vocational education services to older persons, this section provides the context in which current vocational education practices affecting older persons can be evaluated. Vocational education opportunities for older adults are described in Section Two. Section Three provides an overview of the documented methodologies and practices currently utilized in the development of educational programs for older persons. The utilization of older persons as an educational resource is discussed in Section Four and the current state of the art summarized in Section Five. The methodology used to locate and review relevant information is separately described in the Appendix.

FEDERAL/STATE POLICY ON VOCATIONAL EDUCATION FOR OLDER PERSONS

VOCATIONAL OPPORTUNITIES FOR OLDER ADULTS: THE FEDERAL MANDATE

Except for the passage of Social Security legislation, it was not until the 1960's that the Federal Government began to address seriously the needs of older citizens. In 1961, the first White House Conference on Aging was held, affirming the government's recognition of the needs and rights of senior citizens. By 1965, Congress had established two major mechanisms to deliver needed services to older persons: (1) the Medicare Program, which enabled qualified older citizens to receive Federal assistance in meeting medical expenses, and (2) The Administration on Aging, which was established under the Older Americans Act of 1965 to administer a variety of programs designed to help older persons. Since that time, a wide range of social services programs for older persons has been initiated at State and local levels. In demonstrating its concern for the problems of older Americans, Congress passed the Age Discrimination in Employment Act, set up the National Institute on Aging, and created Committees on Aging in the House and the Senate.

In recognition of the failure of Federally-sponsored programs to represent the older population equitably in the delivery of services, the Congress has recently begun to target this population for special consideration in a variety of its legislative actions. During the past decade, an unprecedented amount of Federal legislation has been enacted which specifically addresses the employment and training needs of older Americans. Particularly noteworthy in this regard are the following:

1. The Comprehensive Older Americans Act Amendments of 1978 (P.L. 95-478), which extend the Older Americans Act programs through September 30, 1981, and make changes in the existing law to try to strengthen program effectiveness;
2. The Comprehensive Employment and Training Act (CETA) Amendments of 1978 (P.L. 95-524), which specifically target low-income older persons for the delivery of comprehensive employment and training services;
3. The Economic Opportunity Amendments of 1978 (P.L. 95-568), a new special emphasis program designed to provide experimental employment and training opportunities for unemployed and underemployed low-income persons (including *older workers*);
4. The Federal Employees Flexible and Compressed Work Schedule Act of 1978 (P.L. 95-390), which establishes an experimental program to test the expanded use of flexible and compressed work schedules in the Federal Government. (This program is expected to be most helpful for older workers.)
5. The Federal Employees Part-Time Career Employment Act of 1978 (P.L. 95-437), which establishes a part-time employment program in the Federal Government. (This program is also expected to be most helpful for older workers, as part-time employment may offer an alternative to retirement or additional income to supplement retirement benefits.)
6. The Higher Education Act of 1965, as amended in 1976 (P.L. 94-482) which adds a lifelong learning program mandated to include a review of the organization and design of funding for pre- and post-retirement training and education for the elderly and to assess the educational needs and goals for older and retired persons and their unique contributions to lifelong learning programs.
7. The Library Services and Construction Act, as amended in 1977 (P.L. 95-123), which authorizes funds for grants for older reader services.
8. The Public Works and Economic Development Act, as amended in 1978 (P.L. 95-482), which contains a stop-gap funding resolution for fiscal 1979 to continue 71 older worker projects originally funded by the Administration on Aging under the Title X job opportunities program.
9. The Rehabilitation, Comprehensive Services, and Developmental Disabilities Amendments of 1978 (P.L. 95-602), which authorize grants to State and public or non-profit agencies and organizations for establishing programs and facilities for providing vocational rehabilitation services to handicapped individuals, including blind and deaf persons whose maximum vocational potential has not been reached.

In addition, the Federal Government has begun to direct a great deal of its energy and funds toward increasing the period which older workers spend in the labor force. The Government has approached the problem of early retirement in two principal ways: (1) by amending the Age Discrimination in Employment Act to prohibit arbitrary mandatory retirement before age 70 (P.L. 95-256), and (2) by amending the Social Security Act to increase the maximum amount of benefits available to persons who defer retirement at age 65 and continue working (P.L. 95-216).

While the current Federal policy on employment and training for older persons is clearly one of support, the Federal policy on vocational education for older persons is less clear. The Vocational Education Act of 1963, as currently amended (P.L. 94-482), addresses the educational needs of older persons indirectly under the umbrella of "special needs" groups. As noted by several authors, the Federal Government currently "appears" to have no specific policy on vocational education for older adults. Furthermore, the lack of a clear policy is reflected in the vocational education annual and five-year State plans. Review of these plans indicates only scant reference to the development of programs tailored specifically to the needs of older persons.

THE VOCATIONAL EDUCATION ACT, AS AMENDED

The amendments to the Vocational Education Act enacted by the 94th Congress on October 12, 1976, declared the purpose of Federal assistance in vocational education to be to assist the States

> so that persons of *all* ages in *all* communities of the State . . . will have ready access to vocational training or re-training which is of high quality, which is realistic in the light of actual or anticipated opportunities for gainful employment, and which is suited to their needs, interests and ability to benefit from such training (Section 101).

Clearly, older persons are not excluded from the purpose of the Act. However, non-exclusion is not synonymous with statutory inclusion by specific reference. In Section 110, National Priority Programs are addressed directly to *handicapped* and *disadvantaged* including *those with limited English-speaking ability* and designated set-asides of the Basic Grant allotment are to be used to serve their needs. However, the elderly or older persons are not mentioned per se as a national priority program nor are they specifically addressed as a target population in any other part of the statute. There are but two indirect references to older persons in the entire Act. Federal funds are authorized for use to support vocational counseling and guidance activities which may include

> establishment of vocational resource centers to meet the specific needs of out-of-school individuals, including individuals seeking second careers, individuals entering the job market late in life, handicapped individuals, individuals from economically depressed communities or areas, and early *retirees* [emphasis added] [Section 134 (a) (6)].

In the second instance, States are permitted to use consumer and homemaking funds to

> encourage outreach programs in communities for youth and adults giving consideration to special needs such as, but not limited to, *aged*. [emphasis added] young children, school-age parents, single parents, handicapped persons, educationally disadvantaged persons [Section 150 (b) (D)].

As noted, the first permissive use allows for setting up resource centers for counseling to serve early retirees. The second focuses primarily on developing life-coping skills in persons of all ages, rather than on providing employment and training services to older persons. While older persons are included in general categories of the statute as "individuals seeking second careers" or "unemployed adults," or even "adults," the Act does not specifically address the vocational needs of older persons to upgrade their job skills so as to allow them to continue to make a productive contribution to society.

STATE POLICY ON VOCATIONAL EDUCATION FOR OLDER PERSONS

Five-year and annual State Plans for Vocational Education required under the Act were reviewed. The purpose of this review was to determine the extent of usage of Federal funds to support programs designed especially to meet the vocational education needs of older adults. Citations of specific States are included to highlight the diversity with which older persons are treated in the Plans and are not to be interpreted in the evaluative context.

Historically, States have included in their plans demographic information descriptive of the populations to be served. With respect to older persons as a special category, the States vary considerably as to the quality, type and specificity of demographic information provided. North Carolina includes data on the entire population, ages 0-84, in its report. Wyoming, on the other hand, provides demographic data not only broken down by age groups, but also by current occupation, sex and race. Arkansas, in contrast, details information for persons less than age 54, but has no information whatsoever on adults over 55. The Kansas Plan provides information on the older population (45-64 and 64+) classified according to regions within the State. Two States present no age breakdown over age 24.

In summarization of the findings, many State plans made no attempt to identify older persons as a special subpopulation. Some States presented sparse data on the older age groups; while others gave indication of sophisticated data bases capable of providing sound data for targeted age groups. However, even though older persons were clearly identified as a subpopulation in some instances, most State plans reviewed contained few references to specific programs targeted to their needs.

The most frequently mentioned program for older persons was Consumer and Homemaking Education. However, the emphasis in many of the State plans appears to be on education about the elderly rather than in the delivery of services directly to the elderly. The Kansas Plan, as an example, addresses consumer concerns such as care of the elderly. Nebraska states as an objective to "encourage outreach programs which help youth and adults to understand the special needs of the aged, young children, etc." Likewise, the Hawaii Plan speaks to the need to introduce programs in secondary schools to meet needs of various target groups, i.e., working with the elderly. The Indiana Plan includes the aged along with the handicapped, school-age parents, and disadvantaged as a special needs group, yet clearly delineates objectives and activities for each group except the elderly.

Some states have made specific reference to programs for older persons. The Arizona Plan, for example, reflects concern for the elderly by describing plans to explore and design programs to meet the educational needs of senior adults for self-improvement and supplemental income. This type of program design, although in the developmental stages, focuses specifically on service to older persons, rather than to the provision of information about them. The Connecticut Plan, going a step further, includes the elderly as a special needs group with funding priority given to research projects related to the availability of comprehensive vocational education and career education for special needs groups. In addition, the special needs groups are to be involved in both the planning and evaluation activities. New Mexico reportedly provides services to the elderly through a Family Center. However, from information in the Plan, the services appear to relate more to developing life-coping skills than job skills.

In conclusion, examination of the State plans for vocational education provided scant evidence of the extent to which older persons are being provided opportunities to develop readily employable job skills through access to vocational education programs suited to their needs and realistic in view of labor market needs. Whereas, consumer and life-coping programs are being offered to meet psychological and social needs of older persons, these opportunities do not necessarily serve the vocational needs of older adults who desire to reenter the labor force but lack salable skills, or who are underemployed due to lack of necessary competencies. These results do not necessarily imply that older persons are not now being served. However, what is conveyed is that the nature, kind and extent of services provided older persons by vocational education are not reflected in State Plan activities. That the Plans do not differentiate services to older persons is not surprising since they have never been designated as a national priority.

VOCATIONAL EDUCATION OPPORTUNITIES FOR OLDER ADULTS

Vocational education, broadly defined, may include not only formal education programs designed for occupational preparation, but also: (1) short-term training designed to develop or enhance employability skills and attitudes; (2) vocational and career counseling services; and (3) job placement activities which may facilitate the transition from subsidized to unsubsidized employment, from voluntary to paid employment, from unskilled to skilled jobs, or from part-time to full-time employment.

FEDERAL SUPPORT

Vocational education services as well as other services for older persons are offered through a maze of programs and agencies. Speaking to this point, Rep. Claude Pepper (D-FL), Chairman of the House Select Committee on Aging, remarked, "This is just one example of the fragmented, ineffective, unmanageable, and incomprehensible ways in which the Federal Government provides necessary benefits and services to the elderly" (Congressional Research Service of the Library of Congress, 1977, p. 1).

A recent study reported by Christofell (1978) found 270 programs concerned with adult education and training in 29 Cabinet-level departments and agencies, and estimated Federal support for these programs at $14 billion. However, only a fraction of this money supported learning opportunities for adults beyond the traditional college age. While 180 of these programs were devoted specifically to employment training, only one-third of the funds supported this effort. As noted by Christofell, the Federal Government has established a policy of support for education and training for selected target groups; yet it "spends substantially more on advantaged than on disadvantaged persons, and disadvantaged adults fare poorly when competing with youth for the available education and training" (p. 357).

In 1978, the Administration on Aging and the Office of Education signed a joint working agreement to coordinate efforts to promote the more effective and efficient use of resources available to their agencies in order to maximize the educational opportunities for older persons. Under this agreement, these two agencies commit themselves to serve as advocates in supporting the rights of older persons (1) for opportunities to obtain relevant lifelong education and training, and (2) for necessary support activities and services such as counseling, health services and transportation (National Clearinghouse on Aging, 1978).

EDUCATIONAL OPPORTUNITIES

Generally, education has responded to the needs of older adults through: (1) tuition waivers or reduced tuition for regular course offerings and (2) adult education programs in local school systems and courses in community colleges and universities in which adults may enroll. In 1978, 28 States had passed legislation permitting older students to enroll in regular classes free or at reduced tuition rates (Florio, 1977). By 1978, 43 States and the District of Columbia had full or partial tuition plans for older students (Long and Rossing, 1978).

While many colleges and universities now offer either reduced tuition or tuition waivers and many offer other special privileges and benefits (e.g., reduced fees for athletic and cultural events and programs; waiver of prerequisites for enrollment in non-credit courses, workshops and seminars; counseling and legal services), the existence of classes and programs designed especially for older adults is still relatively uncommon.

In a 1976 survey of 556 colleges and universities, less than one out of three responding institutions reported that they offered instructional programs specifically designed for older students. Of the institutions that had special programs, only about one-third offered courses geared to a second career. Most of the programs for older adults focused on self-enrichment or entertainment. Generally, the public institutions provided more instruction for older adults than did the private institutions (52 percent of the public four-year institutions and 58 percent of the public two-year institutions had such instruction, while only 23 percent and 11 percent, respectively, of the private two- and four-year institutions reported such offerings (Atelsek and Gomberg, 1977). The situation was verified by a 1978 survey of 600 senior colleges and universities. According to survey results, no radical changes were found in the types or composition of programs serving the needs of older persons but considerable interest in instituting such programs was noted (Hirsch, 1978).

According to a "state-of-the-art" report on current community college programs for elders issued in 1975, special programs for elders which existed at that time most often resulted from the interest and initiative of a member of the college administration. The other major factor was the nature of the population of elders in the

community. In communities where older persons were well organized (such as in Minnesota) or represented a high percentage of the population (such as in Florida), programs were initiated because of demand or an obvious need. Other motivating factors included: (1) the availability of State or Federal funds for such programs, (2) the decline of younger students, (3) initiating actions on the part of outside service agencies such as the State Agency on Aging, and (4) existing programs in other colleges in the State (Glickman et al., 1975).

Obstacles to the Growth of Educational Programs for Older Adults

In a recent survey of 350 colleges and universities, the most frequently mentioned obstacle to the growth of educational programs for older adults was a shortage of funds. Other obstacles mentioned included: (1) the cost of the program, (2) a shortage of trained staff, (3) inadequate support services, (4) locating or contacting the audience, (5) lack of interest on the part of older people, (6) inadequate educational materials for the age group, and (7) inadequate facilities (Trent and Trent, 1977).

According to one author, the States encounter four problems in developing educational programs for older adults: (1) the problem of coordination among the States due to the diversity of Federal programs, (2) the fragmentation of State activity due to the formation of multiple agencies and authorities, (3) the lack of reliable information, and (4) the lack of a clear Federal policy on lifelong learning (Richardson *et al.*, 1978).

Older Adult Learners

In 1975, less than three percent of the participants in adult education programs were aged 65 or over, and only about six and one-half percent were aged 55 to 64 (Richardson *et al.*, 1978). While older adults do not participate much in educational programs compared to the rest of the population, there is some evidence that their enrollment has been increasing over the past decade. Moreover, an increasing number of older persons are enrolling in "for credit" courses leading to improved or new jobs. In an Older Americans project survey conducted in Fall 1977, 169 colleges reported about 97,000 students in the 45 to 54 age group, about 40,000 aged 56 to 61 and another 67,000 over age 61. Furthermore, students aged 45 and over accounted for about 67,000 enrollments in degree and occupational curricula in 140 of the colleges. These students were enrolled in regularly scheduled classes and workshops (credit or non-credit) to improve or acquire job skills. In 108 of the colleges providing data, there were almost 75,000 enrollments in special training courses initiated at the request of employers or workers; and 77 of these colleges reported about 11,000 participants aged 45 and over (DeCrow, 1978).

Barriers Faced by Older Adults

While a large number of institutions now allow older students to enroll in classes free or at reduced rates, these privileges often reach only those who are willing and able to enroll in semester-based, on-campus, credential-oriented programs. As one author has noted, education and training systems often have a built-in bias in favor of the young. Basic Opportunity Grants are available only to students who are enrolled more than half-time and studying toward a degree. Many older adults prefer to enroll part-time and often do not seek degrees. Furthermore, many older adults are unable to meet prerequisite requirements for admission to degree programs (Richardson *et al.*, 1978).

Finally, scattered throughout the literature are references to a number of dispositional and physical barriers older learners face. These include lack of self-esteem, lack of money, poor health, fear of unfamiliar surroundings, lack of transportation, unwillingness to attend evening classes, and unawareness of opportunities.

Programs for Serving Older Adults: Cross-sectional Sample

A number of educational programs for older adults have been described in the literature. Most of the programs described focus on reducing some of the psychological and physical barriers faced by older students. Program descriptions for a representative selection are summarized briefly below.

The Donovan Scholars Program at the University of Kentucky	This program allows older adults to enroll free of charge and without consideration of their previous educational background or test scores. Donovan Scholars, also, may park on the campus free of charge (Koller, 1977).

The Back-to-School Survival Skills Program at Drake University	This program helps older adults reacquaint themselves with the college environment and deal with problems they may encounter (Fischer, 1977).
The Community College Program for Elderly Texans	Programs at sixteen Texas compuses offer such innovative educational provisions for older students as academic courses in capsule form, transportation services, and campus guides and aides (Rappole, 1978).
The APEL (Assessment of Prior Experiential Learning Program) at the American University in Washington, D.C.	This program offers "brush up" courses for middle-aged and older women to help them make the transition back to college (George Washington University, 1978).
The Training Program at the Bellevue School of Nursing	This program encourages nursing as a second career for ex- and retired firefighters and police officers (Bianco, 1978).
The Senior Guest Student Program at Kent State University	This program offers "Gateway Seminars" to help ease the transition of older adults from their previous lives to their lives as students, as well as reduced fees for parking and bus services (Koller, 1977).
The Elderhostel Program at the University of New Hampshire	This program, which is part of a national network of low-cost educational hostels for the elderly, offers week-long mini-courses designed to help older adults reaffirm their identity in an academic setting (American College Testing Program, 1977).
The Guest Student Program at the University of Wisconsin	In the development of this program, a number of approaches were utilized to get more older adults to enroll. These included opening a guest student lounge, issuing appealing publicity about the program through a number of media, providing student guides and transportation and simplifying the registration procedure (Baum et al., 1977). More recently, the University of Wisconsin has received funds from the Administration on Aging to initiate a community-based learning center project to bring education to older students in a senior center, housing project, nutrition center or day care center (Special Committee on Aging, 1979).
The Second Careers Program at the George Washington University School of Medicine and Health Services	This program combines classroom work and field experience with individual and group counseling to help educationally underserved elders explore the option of a second career in the health field (Boren *et al.*, 1979).
The Institute for Retired Professionals at the New School for Social Research in New York City	This program combines regular classwork with special opportunities for retired professionals to structure their leisure time in roles as teachers, leaders, reporters and activists (Hirsch, 1978).
The Florida Junior College in Jacksonville	This institution provides instruction for more than 1,000 older students at several locations, including nursing homes, community centers and schools (Robert, 1978).

Private Foundations and Organizations

A number of foundations and organizations in the private sector have supported educational opportunities for older adults through either funds or supportive services. The Edna Clark McConnell Foundation, the NRTA/AARP Andrus Foundation, the Ford Foundation and many other foundations, as well as a variety of local civic groups have contributed funds to support learning programs for older adults. Supportive services are offered through a number of organizations including: (1) the Association of Community and Junior Colleges in Washington, D.C., which conducts an older Americans program to assist its member colleges in developing programs for older adults; (2) the Academy for Educational Development, in New York, which issues publications which promote educational/employment opportunities for older persons; and (3) Elderwork, Inc., in New York, which issues newsletters and other publications to promote the training and utilization of older workers.

EMPLOYMENT AND TRAINING SERVICES

Descriptions of programs for older adults oriented to development of employability and job skills are scattered throughout the literature. Most of the articles containing such descriptions emphasize the success and growth of these programs. While a large number of the programs described were supported primarily through Federal monies, a good number were supported in part or totally by other sources (e.g., local civic groups, businesses, private contributions, etc.). Examples of past and current programs described in the literature include:

- Project ASSERT in Ohio, which offers opportunities for retired technicians to serve as volunteers in postsecondary education (Sheppard, 1979).
- The Senior Employment Services program in Wilmington, Delaware, which locates jobs for older adults who have home repair skills (*Aging*, November 1974).
- The training program of the Coordinating Council of Senior Citizens in Durham, North Carolina, which offers training opportunities for older adults who wish to serve the fragile elderly (Fillenbaum and Willis, 1976).
- New Career Opportunities, Inc., in Glendale, California, which teaches older adults how to turn their skills, hobbies and life experiences into profitable home-based enterprises (New Career Opportunities, Inc., 1979).
- The Senior Skills Center in Santa Rosa, California, which offers older adults opportunities to train other older adults for second careers (Brown, 1977).
- The Alpine Project in Chicago, Illinois, which assists chronically unemployed older workers obtain employment (Jewish Vocational Service, 1971).
- The Senior Worker Activity Program (SWAP) in Raleigh, North Carolina, which locates part- and full-time jobs for senior citizens (Wake County Council on Aging, 1979).
- Mature Temps in 13 cities throughout the country, which hires older blind persons and contracts their services out to another employer (Dickey, 1975).
- The Heritage Arts Program at Salem College in Salem, West Virginia, which employs older artisans to teach authentic quilting, chair caning, basket weaving and other such skills (Sullivan and Florio, 1976).
- Project STEP (Senior Tutor and Educational Progress) in Redding, Connecticut, which utilizes retired citizens to tutor learning disabled students (Drummond *et al.*, 1975).
- A program of the Mayor's Office for Senior Citizens in Chicago, Illinois, which utilizes outreach and advocacy to create new employment opportunities for older adults (Oliver *et al.*, 1976).
- Project Reach in Massachusetts, which utilizes retired resource persons to help target populations make better occupational decisions (Najarian, 1976).
- The Human Service Centers in the Bronx, New York, which provides opportunities for elders to serve their peers as advocates and ombudsmen for Social Security, Medicare and Medicaid, welfare, food stamps, unemployment assistance and other services (Davis and Taylor, 1976).
- The Home Health Aide (HHA) training program in Lee County, Florida, which trains low-income senior citizens to deliver health care services to the elderly (Lyons and Steele, 1977).
- The Teacher Aide Program (TAP) in Iowa, which hires older adults as teacher aides for vocational programs serving disadvantaged and handicapped students (Special Needs Section, State of Iowa Department of Public Instruction, 1978).
- The Surrogate Parent Program in Miami, Florida, which offers older adults classroom instruction and on-the-job training in child care (Slack, 1976).
- The Economic Development Council in New York City, which, as part of its program, hires retired executives as consultants to city agencies (Fullerton, 1978).
- Project RENEW in five States, which trains older adults and places them in local job service employment offices (Anderson and Fine, 1978).

PROGRAM DEVELOPMENT: AN OVERVIEW OF CURRENT METHODOLOGIES AND PRACTICES

A number of recent articles (Zarakov, 1978; McCann, 1978; Gross, 1975; and Hoffman, 1975) focus on the declining enrollments of traditional college students (i.e., those students under age 35) and the need for educational institutions to turn their attention to developing programs to meet the needs of an expanding older population. Furthermore, there is evidence that many of these institutions are attempting to assess the educational and other needs of older persons and to adjust their programs and curricula accordingly, in order to attract and accommodate an older clientele. The documentation of these efforts represents a major reservoir of information for those interested in developing effective vocational education programs for older persons.

It should be noted that relatively few of the programs for older adults described in the literature pertain specifically to vocational education. Furthermore, while a number of publications (e.g., planning guides, project reports, etc.) list steps for planning and implementing educational programs for older persons, few contain detailed descriptions of generic procedures and methodologies which might be utilized in such an effort.

Particularly lacking in the literature relating to vocational education/training for older persons is a comprehensive manual describing specific methods and techniques for *all* phases of program development (i.e., methods and techniques for conducting needs assessments, establishing goals and objectives, assessing available resources, evaluating programs against objectives, etc.). Such a comprehensive manual is of particular importance in that the greatest obstacle to the development of educational programs for older persons, as perceived by college administrators, is the lack of knowledge and information on techniques of planning and developing programs for this population (see Glickman, *et al.*, 1975).

It is beyond the scope of this brief report to fully describe, analyze and discuss current program development methodologies and practices. However, a brief overview of the literature relating to program development is presented below.

PLANNING

Publications that deal with planning educational programs for older persons fall mainly into two categories: (1) those that describe how programs can or should be developed (e.g., program planning guides), and (2) those that describe how programs have been developed (e.g., project reports).

Program Planning Guides

Over the past few years, a number of program planning guides (or manuals) have been prepared specifically to aid community colleges and other institutions interested in developing educational programs for older persons. Typically, these guides offer step-by-step procedures for developing programs as well as guidelines for implementing each step. Some go so far as to describe and discuss methodologies which have been or could be utilized in some of the stages of program development.

A particularly noteworthy example of a guide for planning educational programs for older persons is *A Manual on Planning Educational Programs for Older Adults* (Hendrickson, 1974). This manual not only lists, defines and discusses the procedural steps that should be taken in program development, but it also describes some of the techniques that have been used in conducting needs assessments and evaluations. In addition, the manual contains lists of some potential sources of funding (e.g., State legislative provisions, Federal grants, private foundations, private donors, sales and auctions, etc.) and some facilities that could be utilized in program implementation (e.g., church buildings, lodge and labor halls, community rooms in banks and savings and loan associations, vacant store fronts, libraries, etc.).

Another example of a program planning guide for educational programs for older persons is *Community Colleges Respond to Elders: A Sourcebook for Program Development* (Glickman, *et al.*, 1975). While this sourcebook primarily addresses procedures rather than methodology per se, it does contain a wealth of materials useful to program planners, including: a "state-of-the-art" report on current community college programs for elders, an inclusive model of education program development, sample core curricula, case studies, and sample forms, letters and materials. Contained in the inclusive model of educational program development are general guidelines for:

- Convincing college administrators and governing boards that the college should reach out to serve elders in the community;
- Developing an alliance between elders and the community through the formation of a representative coalition of older adults;
- Assessing the educational and related needs of older persons;
- Selecting program content;
- Insuring program effectiveness;
- Maximizing resources.

Two other documents which merit mention are *Development of a Model for a Senior Citizen Bureau — Final Report* (Stoehr and Covelli, 1977) and *How to Plan a College Program for Older People* (Scanlon, 1978). While these two documents are somewhat less comprehensive than those described above, they do contain recommendations/guidelines for program development. The first of these documents was designed as a tool for vocational, technical and adult education district staff. In addition to recommendations/guidelines for educational program development for senior citizens (defined as those aged 62 or over), it contains information on Federal funding agencies and descriptions of twenty-four courses designed for older adults. Included in the second document are descriptions of six model educational programs for older adults and descriptions of such working tools as marketing instruments, evaluation instruments, financial reports and newsletters.

Project Reports

As was mentioned, project reports constitute the second major source of information on planning educational programs for older persons. These reports typically contain detailed descriptions of the procedures, methods and strategies utilized in the development of an existing program. Some of these reports describe "replicable model programs." However, careful deliberation should be given to the use of these program descriptions as a planning tool or guide. The planning techniques (e.g., needs assessment and evaluation methodologies/procedures) described in a given project report may not be appropriate for other program planning endeavors. For example, a number of the techniques used in the development of a rural satellite-based education delivery system would be totally inappropriate for use in developing a university-based work/study program. Here, program planning guides offer a potential advantage over project reports in that they have the capacity to describe and discuss alternative planning strategies. On the other hand, project reports quite often provide valuable information regarding the effectiveness of various planning techniques in specific situations.

A number of project reports are worthy of mention. However, for the sake of brevity, only three are described below.

1. Brooks (1975) describes the program development and operation of a model work-study program for senior adults at Los Angeles Valley College in California. Included in her report are descriptions of (1) the staffing, budget, publicity, job development and course development procedures, placement program, employer workshops and evaluation procedures utilized in the program, and (2) problems cited in the evaluation report.
2. Baum (1977) reports on a project conducted at the University of Wisconsin to identify and implement effective interventions that might encourage older persons to use the university's resources. Included in her report are descriptions of the survey procedure utilized, interventions implemented, and results obtained.
3. Shapiro (1977) reports on the development of a model adult education program for elderly residents of skilled nursing facilities in a school district in Washington. Included in his report are detailed descriptions of the procedures, activities and strategies related to program development.

Other Sources

Also of potential use to planners of educational programs for older persons are recent publications by Tamburello (1976), Katz and Freeman (1978) and Gibson and Gilbert (1979). Tamburello describes a comprehensive plan for educational support services to the aged developed for Pensacola Junior College in Florida. Katz and Freeman provide an organizational and management plan for community colleges and libraries interested in developing satellite-based delivery of continuing education and training programs for populations that are unserved and underserved (including older adults). Gibson and Gilbert define some of the problems of delivery systems and services for older adults and offer a model of a viable, utility-maximizing human delivery system.

GOALS/OBJECTIVES DETERMINATION

Generally, the impetus for the development of existing educational programs for older persons has originated from one or a combination of three sources: (1) an organization's statement of purposes, (2) a community group's concern, or (3) a mandated policy or regulation. Given this impetus, a variety of procedures and techniques have been utilized in the development of specific program goals and objectives. However, by far the most common approach has been to establish a separate committee, such as a task force or planning council, and to delegate to that committee such responsibilities as: (1) investigating the need for and existence of programs and services, (2) formulating specific program objectives based upon their findings, (3) prioritizing those objectives, and (4) determining strategies to be utilized in attempting to achieve those objectives. Typically these committees serve two important purposes: (1) they promote coordination among the various agencies involved in service delivery, and (2) they provide structure and focus to the group process approach for setting goals and objectives. A common feature of the committee approach is the inclusion of older persons as committee members.

The techniques which have been used in developing goal and objectives statements are not well documented in the literature relating to vocational education/training for older persons. However, a document which would be of use to persons interested in developing such statements is a manual designed by Hughes and Rice (1978) on planning procedures for mainstreaming the handicapped into vocational education programs. Included in this manual are sample structures for goal and objectives statements and lists of action verbs for consideration during the development of goals and objectives.

NEEDS ASSESSMENT

As noted by Sadowski (1977), research in higher education relating to the elderly has generally taken two directions: (1) functional needs assessments, and (2) market analysis strategies. An example of a functional needs assessment can be found in Howard McClusky's (1971) paradigm. His hierarchy of functional needs (coping needs, expressive needs, contributional needs, influence needs) is based upon expert knowledge and opinion, rather than upon expressed interests and preferences of older adults. According to Sadowski, the market analysis approach goes one step further, by incorporating the expressed needs and interests of older persons as the guiding principles for designing educational programs and strategies.

A variety of techniques have been used to assess the educational and related needs of older persons. These include:

- literature reviews;
- research studies;
- formal survey instruments;
- informal survey instruments or self-developed checklists;
- consultation with knowledgeable persons; and
- intuition.

Examples of some of the more common as well as some of the more innovative or less common approaches and techniques which have been used in conducting needs assessments are discussed below. These examples are followed by a brief review of some of the criticisms/observations that have been made regarding current needs assessment practices.

Examples of Approaches/Techniques

The most common approach to assessing the educational and related needs of older persons involves the administration of the ordinary wants and needs survey and/or questionnaire. Such an approach is described by Galvin and his associates (1975). They describe a project specifically designed to provide both a needs assessment of aging and retired persons in the areas of vocational education and training, and training for researchers in survey research methodologies. As this is a particularly exemplary study, it will be reported in some detail.

The project began with training sessions and workshops designed to orient research directors and occupational education specialists to the problems of the aged and to review recent developments in survey techniques.

These training sessions and workshops were jointly conducted by project staff and specialists in geriatrics, population sampling and social research.

A primary purpose of the workshops was to explore in detail the problems of conducting a needs assessment. Problems which received special attention from the workshop participants included:

- the reliability of current sampling techniques;
- biases and non-sampling errors in survey results;
- regression estimates;
- double sampling methods;
- sampling for time series;
- systematic sampling;
- other sampling methods;
- response errors in surveys; and
- the role of non-sampling errors in determining survey design.

Toward the end of the workshops, each college research specialist developed a sampling strategy to meet the unique needs (geographical, social and economic) of his/her institution. In addition, the workshop participants collectively developed a model needs assessment instrument designed to elicit such information about the target population as:

- their learning styles;
- their occupational training needs; and
- the types of programs, activities and learning environments best suited to serve them.

Sections of the model survey instrument were devoted to each of six basic areas: (1) program activities, (2) location, (3) special services, (4) program emphasis, (5) occupational training, and (6) length of training. Each section consisted of a check-list questionnaire. The section covering occupational training is presented below in greatly abbreviated form.

Occupational Training

This college offers occupational training in many areas. Below are listed several areas where it is believed that job openings exist for older adults. (You may check more than one.)

A. Architecture/Architecture Technology/Drafting
B. Design
C. Merchandising/Sales
D. Accounting/Finance/Bookkeeping
E. Management
F. Clerical/Office Machines
G. Data Processing/Computer Programming

Another common technique used in conducting needs assessment survey consists of administering an open-ended questionnaire such as the one described in a report by Hooper and March (1978). The purpose of the study reported was to determine the demographic characteristics and attitudes toward lifelong learning of a sample of older (aged 65 and over) students attending university classes in Wisconsin. The interview instrument utilized in the study consisted of three components:

1. open-ended questions regarding class format preference, preference for ages of fellow students, and university-level experience of significant others (spouses, parents, siblings, etc.);
2. questions concerning demographic characteristics (age, sex, marital status, work history, present daily activities, etc.); and
3. questions regarding the respondents' attitudes toward lifelong education and their perceptions of the reasons for the relative non-participation of elders in formal education.

A potentially useful, though less commonly reported, method of assessing the educational needs of older persons involves the use of rating scales. An example of such an approach can be found in Boshier and Riddell (1978). They report on a study designed to determine the motivating factors for participation in adult education. This study utilized a short form of the Educational Participation Scale and data from a population of older adults enrolled in adult education programs in Vancouver, British Columbia. According to the authors, this scale promises to be useful in planning programs for older adults.

Another innovative assessment technique is reported by Gurland *et al.* (1978). CARE (Comprehensive Assessment Referral Evaluation) elicits, records, grades and classifies information on the health and social problems of older persons.

The methods of conducting a functional needs assessment are not well documented. However, the application of such an approach can be found in a report by Boren, McCally and Goldberg (1979). They describe a model second careers program for older adults (those aged 45 and over) implemented by the George Washington University School of Medicine and Health Services. According to the authors, this program was developed on the basis of a number of assumptions regarding the needs of older persons. These assumptions were based on:

- demographic and epidemiological data;
- developmental characteristics of persons in mid-life;
- possible consequences of personal and social stress during mid-life; and
- the relationship between work and mental health.

While the special problems and employment and educational needs of minority/ethnic group elders are well recognized in the literature, very little attention has been given to methods of assessing the vocational needs of these populations. However, a potentially useful approach to such an assessment can be found in a recent report (Peralta and Horikawa, 1978) describing the efforts of the Asian-American Council of Greater Philadelphia (PA), Inc., to identify, locate and assess the characteristics and needs of elderly Asian-Americans in the Philadelphia area. While the study reported does not deal with vocational education per se, it does suggest some innovative techniques which might be helpful in assessing the educational and related needs of various ethnic groups. These include choosing outreach workers to reflect the ethnicities and ages of their groups and interviewing the elderly in their own languages or dialects.

Criticisms/Observations Regarding Needs Assessment

Several authors are critical of current needs assessment practices. For example, Sadowski (1977) maintains that wants and needs assessments (the types of studies most frequently conducted by the community colleges) lack sufficient theoretical basis and generalizability to enable college planners to design appropriate curriculums and programs. He further points out that few investigations have been conducted which used as a population the total membership of a large urban city's senior citizens centers.

In reference to needs assessments, Bader (1978) cites four areas of deficiency in the literature: (1) the lack of a full-blown study of learning by older adults in the "natural" setting of ongoing coursework; (2) the lack of information as to how best to present materials to be learned by seniors, how best to design learning environments for seniors, and how to reinforce their learning; (3) the lack of studies of short- and long-term learning among older persons as it originates in the classroom, training session or journal discussion group and (4) the lack of sophisticated studies of the effects of living arrangements on educational activities among older students.

Finally, as noted in Bell *et al.* (1976), no national assessment has ever been made of the educational needs of older adults.

ASSESSMENT OF EDUCATIONAL AND COMMUNITY RESOURCES

In the development of educational programs for older persons, the assessment of educational and community resources serves three primary purposes: (1) the establishment of priorities for program implementation based on a comparison of the current need for and existence of programs and services; (2) the identification of service delivery strategies and/or (3) the identification of existing resources which may be tapped during pro-

gram implementation. The assessment process generally consists of two phases: identification and evaluation. The identification procedure typically consists of performing a review of the literature and/or conducting a survey to determine the extent, nature and location of programs and activities related to service delivery. Evaluation procedures commonly consist of: (1) developing a set of criteria by which the programs and activities identified in phase one can be evaluated; (2) evaluating the programs and activities in terms of those criteria; (3) selecting programs for further study based upon the evaluation; and (4) conducting surveys of on-site visits to those exemplary programs.

The above process is well illustrated in a report by Moore and Granger (1976). They describe a nationwide study of cooperative industry/adult education programs for adults with less than a high school education. The purpose of the project was to identify, study, and disseminate information about existing programs so that the programs themselves might act as models for future collaborative efforts. Phase one of the project consisted of identifying and contacting persons believed to be directors of cooperative industry/adult education programs. The purpose of these contacts was to identify existing cooperative programs. Phase two consisted of (1) developing criteria by which the identified programs could be examined, and (2) examining a sample of the programs in terms of these criteria.

A panel composed of representatives from industry and labor, adult educators, directors of State departments of adult education and local program directors used a needs assessment process to develop the criteria. The criteria developed consisted of twelve broad areas of concern and under each of these a varying number of specific statements clarifying that general topic. These specific statements provided the basis for developing the questionnaire, telephone interview and site visit data collection instruments subsequently used in the study.

A similar procedure was used in a study reported by Atelsek and Gomberg (1977). In this study, a higher education panel consisting of a network of representatives at 642 colleges and universities used a survey instrument and mail and telephone follow-ups to conduct a survey to identify existing community services, unique programs, sources of funding and plans for programs and services.

The panel approach to assessment was also used in a study reported by Attard (1977). In this instance, a department of senior citizens affairs mobilized a task force composed of representatives from business, labor, education and government. The mission of the task force was to analyze the needs of older persons, establish priorities and formulate strategies to meet those needs. This was accomplished through the formation of ten special committees, including committees on education and employment. Specifically, the tasks of these committees collectively were to:

- analyze need and problem situations;
- inventory existing services and resources;
- identify barriers and gaps;
- formulate alternatives and strategies to meet needs; and
- translate findings and strategies into recommendations and/or courses of action and rank them according to priority.

At the time of the report, one program had been implemented: a job developer had been recruited to plan, develop and coordinate a county-wide thrust to increase employment opportunities for persons aged 55 and over.

COUNSELING AND REFERRAL

Sinick (1975) offers an excellent discussion of the role counselors can play in serving the unique career counseling needs of older persons. As he points out, many older persons seeking second careers lack self-confidence. They often adopt ageist generalizations as applicable to themselves. This lack of self-confidence among older persons is vividly reported by Boren, McCally and Goldberg (1979, p. 15). In describing the older adults participating in a Second Careers Program, they noted that ". . . among this group of well-educated, articulate, capable people, there was not a single exception to expressions of personal inadequacy and of feelings that they not only lacked the necessary skills but even the capacity to acquire skills for a new vocation."

Even those older persons with excellent job-seeking skills and good self-images have to contend with the biases of employers. According to Sinick, counselors have a role to play not only with respect to generating

self-confidence within older clients but also with respect to assisting employers in the hiring of older workers. Specifically, they can inform employers about the benefits to be derived in hiring older workers (e.g., their low turnover rates, high output records, etc.) and about techniques for training new workers, matching workers and jobs and redesigning jobs.

In order to effectively serve older clients seeking new careers, counseling personnel must be knowledgeable about social contexts, developmental characteristics of older persons, legislation, safety and health, characteristics of the job market and a variety of other areas. In particular, they must have a well-grounded knowledge of the world of work. In recent years there has been a great deal of criticism of the quality of counseling and guidance services in general. The focus of much of this criticism has been on counselors' lack of competence in guiding persons toward vocational education. In particular, counselors have been found to know very little about the world of work outside of education. As a result, the National Advisory Council on Vocational Education devised a project to infuse individuals with backgrounds and experience in business, industry and labor into the counseling system. This project, as described by Najarian (1976), involves the use of retired persons as resource counselors.

As has been noted by DeCrow (1978), many colleges already have a number of resources which may be tapped in meeting the career-related needs of older persons. These include:

- established relations with local employers in a variety of occupational training programs;
- placement services;
- job counseling services and means of verifying skills; and
- forms of organizing, administering and publicizing new programs.

Counseling Programs

Over the past decade, the counseling professions have begun to focus a great deal of attention on developing new techniques and programs for older persons. Moreover, a number of counseling programs have been designed and implemented specifically to serve older persons making career decisions. Some of these programs focus entirely on counseling; others involve educational and work activities as well. Two exemplary counseling programs are described briefly below.

Center for Career Transition, University of Florida

The Center for Career Transition at the University of Florida has developed a series of career counseling modules for older adults. This series consists of (1) five core modules (e.g., "Creating a Personal Definition of Work," "How to Undertake a Career Self-Assessment"); (2) six skills clusters (e.g., "How to Write a Resume that Works," "Setting Career-Life Goals — Making Career-Life Decisions"); and (3) eight knowledge clusters (e.g., "Educational and Work Opportunities," "Women's Re-Entry Concerns"). These modules are designed for use by older clients in conjunction with pre- and post-counseling sessions. Included in most of the modules are exercises and mini-quizzes for the clients to complete. A central feature of these modules is their focus on developing older clients' coping skills and self-confidence.

Second Careers Program, George Washington University

Another example of an exemplary approach to career counseling is the Second Careers Program mentioned previously (Boren, McCally and Goldberg, 1979; Boren, Terry and McCally, 1976). The major objectives of the program were (1) to demonstrate the effectiveness of an educational and counseling model for helping older persons (those aged 45 and over) cope constructively with mid-career changes, and (2) to develop techniques and to engage in activities that would have an impact on age discrimination barriers affecting employment and educational opportunities for older persons. The program, as implemented, incorporated group and individual counseling in the context of brief academic exposure and field experience. A unique aspect of this type of program is that it allows students to take the preliminary steps of exploring their career interests in a practical and supportive setting before entering a formal career program. Thus, students may avoid large expenditures of time or money until they are confident of their interests, motivations and competencies.

Referral

A variety of techniques (e.g., announcements on radio and television, speaking engagements before church and civic groups, advertisements and special articles in newspapers, slide and video tape presentations at senior citizen centers, letters to members of organizations composed largely of older adults, etc.) have been used to refer older persons to educational programs/resources. Equally varied are the approaches which have been used to refer older persons to employment opportunities. These approaches include developing skill banks, community work centers, community-based placement centers, special college placement programs and cooperative education or work/study programs.

OLDER PERSONS AS EDUCATIONAL RESOURCES

According to a recent study conducted by the Academy for Educational Development (AED), approximately one million persons over age 60 are teaching and many of these older persons are employed as volunteers. As a part of that AED study, a survey (see Sullivan and Florio, 1976) was conducted of over 2,000 public school districts and over 1,000 colleges and universities to determine how many persons aged 65 and over were employed in or contributing their services to education, what they were doing, and how well they were doing it. The preliminary findings of that survey (based upon responses from 950 institutions) included the following:

- many educational institutions involve older persons in teaching or teaching-related efforts;
- service opportunities for older persons in the public schools are primarily for volunteer tutors, teacher aides and resource people;
- higher education service opportunities for older persons are evenly divided between voluntary and paid employment; and
- the services provided by older persons in institutions are highly valued.

Older persons in these institutions surveyed were serving in a variety of capacities, such as: library aides, teachers, substitute teachers, consultants, creators of educational games, administrators, research consultants, advisory council members, "foster grandparents," media production aides, census takers, sources of oral history, activity leaders, doctors, nurses, accompanists, speech therapists, work experience placement counselors, museum personnel, houseparents, trustees, bookstore managers, fund raisers, liaisons with alumni and recreation aides.

As the above list suggests, there are a multitude of educational services older persons can provide and are providing. However, as Sheppard (1979) has noted, older persons have only sparingly been used as resources for education programs. While three out of four institutions surveyed by the AED utilized the services of older adults in "educating" roles, the number of older persons utilized at individual institutions was quite low.

The National Committee on Careers for Older Americans (1979) has recently issued a report entitled *Older Americans: An Untapped Resource.* This report offers an excellent discussion of the roles older persons can play in strengthening community services and how this valuable resource can be tapped. Included in the report are some examples of unique services older persons can and are rendering in the field of education. These services include remedial tutoring of dyslexic children, tutoring the functional illiterate, and preparing youth for the world of work. As is pointed out in this report, many older persons have expressed a desire to make a contribution to society; yet many of these elders are unaware of opportunities for services. Furthermore, many older persons fail to realize that they have valuable talents and skills that could be brought to bear for the betterment of society.

Older persons have been utilized as volunteers in a variety of educational settings. Through such National programs as Foster Grandparents, the Retired Senior Volunteer Program, and the Peace Corps, older persons have contributed their time and talents in such activities as helping very young children overcome speech problems, helping junior high school students with remedial lessons, assisting teachers to deal with disruptive students, training teachers in under-developed countries and working with young people in industrial arts classes.

The methods and procedures used in the development of older adult volunteer programs are not well documented. However, a document which promises to be useful in the development of such programs is currently being prepared by CONSERVA, Inc., for the U.S. Department of Education. This document, entitled the *Volunteers in Vocational Education: A Handbook for Program Implementation*, contains guidelines for planning, administering and evaluating volunteer programs in vocational education.

SUMMARY

In order to assess the current "state of the art" in vocational education for older persons, it is necessary to examine first some of the economic and political forces impacting the delivery of vocational education services to older persons. In recognition of the growing numbers of older persons, their underrepresentation in the active labor force, the untapped potential residing in this population and the possible repercussions of trying to support a large number of individuals in retirement, the Federal Government has recently begun to focus a great deal of attention on increasing employment and training opportunities for older persons.

While the Federal policy on employment and training for older persons is clearly one of support, the Federal policy on vocational education for older persons is less clear. The Vocational Education Act, as currently amended, addresses the educational needs of older persons indirectly under the umbrella of "special needs" groups. As noted by several authors, the Federal Government currently "appears" to have no specific policy on vocational education for older adults. Furthermore, this lack of a clear policy is reflected in the vocational education annual and five-year State plans. These plans contain only scant reference to the development of programs tailored specifically to the needs of older persons.

In spite of this lack of clear-cut Federal/State support for vocational education for older persons, educational programs and related services for older persons have increased substantially over the past decade. Furthermore, a growing number of older persons is taking advantage of these programs and services. Nonetheless, older persons continue to be underrepresented in educational programs, compared to other age groups. Generally, two types of educational services are currently available to older persons: (1) tuition waiver to reduced tuition for regular course offerings, and (2) courses and programs for which older students can enroll.

Many colleges and universities now offer older persons either reduced tuition or tuition waivers as well as other special privileges and benefits such as reduced fees for athletic and cultural events, waiver of prerequisites for enrollment in non-credit courses and workshops, and counseling and legal services. However, the existence of special classes and programs for older adults is still relatively rare. Furthermore, most of the educational programs for older persons which do exist focus primarily on self-enrichment and life-coping skills. Few programs exist which are aimed specifically at preparing older adults for volunteer or paid work.

A number of barriers exist which discourage older persons from participating in formal education and training programs. Many education and training systems have a built-in bias in favor of the young. For example, educational opportunity grants are typically available only to students who are enrolled more than half-time and studying toward a degree. Many older persons prefer to enroll part-time and often do not seek degrees. Moreover, those who wish to seek a degree frequently are unable to meet prerequisite requirements for enrollment in degree programs. Finally, potential older learners face a number of dispositional and physical barriers. Among these are lack of self-confidence, lack of money, poor health, fear of unfamiliar surroundings, fear of competition with younger students, lack of transportation and unawareness of opportunities.

Educational institutions interested in developing vocational education programs for older students also face a number of potential barriers. Obstacles to program development most often mentioned in the literature include (1) lack of knowledge/information about how to plan and implement such programs; (2) shortage of funds; (3) shortage of trained staff; (4) inadequate support services; (5) lack of educational materials appropriate for the age group; (6) inadequate facilities; (7) the problem of coordination among States due to the diversity of Federal programs; (8) the fragmentation of activity due to the formation of multiple agencies and authorities; and (9) the lack of a clear Federal policy on education for older adults.

In reviewing the literature relating to education for older persons, a number of publications (e.g., program planning guides, project reports, etc.) were found which listed steps for planning and implementing *educational* programs for older persons. However, few of these publications contained detailed descriptions of the generic procedures and methodologies which might be utilized in such an effort. Particularly lacking in the literature was a comprehensive manual describing alternative methods and techniques for all phases of *vocational education* program development (i.e., methods and techniques for conducting assessments, establishing goals and objectives, assessing available resources, evaluating programs against objectives, etc.).

It is hoped that the policy/planning guide and program development handbook, the next two major products of this project, will help to fill this information gap.

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Appendix

PROJECT METHODOLOGY

This summary overview was compiled based upon information obtained through an extensive search of published materials relating to vocational education/training for older persons. Its preparation followed two stages of information development: identification and review. Contained in the following sections are descriptions of the procedures used during the two stages and some concluding remarks concerning the preparation/content of the document.

IDENTIFICATION OF SOURCE MATERIAL

The identification process included six major components:

1. Comprehensive library search;
2. Contact of knowledgeable persons including members of Congress and heads of university gerontological centers, State agencies of vocational education, State agencies on aging, and State offices of adult education;
3. Contact of foundations/associations;
4. Contact of publications' editors;
5. Screening of related conference proceedings;
6. Screening of State plans for vocational education and annual reports.

Library Search

A comprehensive library search was conducted among the libraries at each of the four major universities in the Research Triangle Area of North Carolina (North Carolina State University, the University of North Carolina at Chapel Hill, North Carolina Central University and Duke University), and at each of three libraries/information banks in the Baltimore-Washington, D.C., Area (the National Clearinghouse on Aging, the Information Resources Center, and the HUD Library and Information Division). The library search consisted of:

1. A thorough search of index files and preliminary check of documents to determine applicability to vocational education for older persons;
2. Screening of the reports contained in ERIC, the National Technical Information Service (NTIS), the National Clearinghouse on Aging (NCOA), the Clearinghouse on Adult Education and Life-Long Learning (ADELL) and the Federal Community Education Clearinghouse;
3. Review of the 1975-1979 issues of journals, such as *Voc Ed*, to locate pertinent articles; and
4. Review of bibliographic documents for the field of vocational education as related to older persons.

Contact of Knowledgeable Persons

In a further effort to identify relevant literature, contacts were made with the seven major university-based gerontological centers:

1. The Institute for Learning and Retirement, Duke University, Durham, North Carolina;
2. The Program on Aging, University of North Carolina, Chapel Hill, North Carolina;
3. The Institute of Gerontology, University of Michigan, Ann Arbor, Michigan;
4. The Philadelphia Geriatric Center, Philadelphia, Pennsylvania;
5. The Institute for Study and Aging, University of Miami, Coral Gables, Florida;
6. The Levinson Gerontological Policy Institute, Brandeis University, Waltham, Massachusetts; and
7. The University of Southern California Gerontology Center, Los Angeles, California.

The directors/heads of these centers were contacted, briefly informed of the project goals and asked to identify any recent literature on the subject of vocational training/education for older adults of which they were aware. Similar contacts were made with the directors/heads of all the State departments of vocational education, State agencies on aging and State offices on adult education as well as with the chairpersons of Senate and House Committees on Aging.

Contact of Foundations/Associations

Letters were sent to the directors/heads of 16 agencies/institutions concerned with vocational education and/or aging:

1. The American Vocational Association;
2. The National Advisory Council on Vocational Education;
3. The American Personnel and Guidance Association;
4. The National Council of Large City Directors of Vocational Education;
5. The National Vocational Guidance Association;
6. The National Center for Research in Vocational Education;
7. The National Institute on the Aging;
8. The National Council on the Aging;
9. The Federal Council on Aging;
10. The National Council of Senior Citizens;
11. The National Association of Area Agencies on Aging;
12. The Administration on the Aging;
13. The Adult Education Association of the U.S.A.;
14. The National University Extension Association;
15. The Association for Continuing Higher Education; and
16. The American Association of Community and Junior Colleges.

Each of the directors/heads of these organizations was informed of the project goals and asked to cite any recent literature which he/she thought might be helpful, as well as additional sources of information.

Contact of Editors of Publications

In an effort to identify and locate fugitive literature, letters were sent to the editors of all the major journals believed to deal with vocational education and/or older persons. Each of the editors was informed of the project goals and asked to identify any recently published and unpublished literature relating to the topic of vocational education/training for older persons.

Screening of Conference Proceedings and State Plans

Finally, the proceedings of the American Vocational Association Conventions from the last two years as well as the program for the next AVA Convention were screened, as were the Vocational Education State Plans and Annual Reports, for pertinent activities, meetings, and projected plans.

DOCUMENT REVIEW

The identification process yielded more than 2,000 publications relating to the subject of older persons/vocational education. These publications were then screened on the basis of: (1) their currency, and (2) their applicability to vocational education program development, as suggested by their titles and abstracts (where present). This screening process resulted in the identification of approximately 500 publications which were deemed to be of potential use in preparing the report. A concerted effort was made to obtain microfiche or hard copies of as many of these publications as possible. Copies of some 300 such publications were ultimately obtained, reviewed and summarized on reference sheets. The information on these reference sheets provided the primary basis for the preparation of this report.